User Manual

For

OGCIO WCMS Project

Prepared By

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December 2006

Distribution and Release

Copy No.	**Holder**
1	OGCIO
2	ASL

Amendment History

Change Number	Revision Description	Pages Affected on Respective Version	Revision / Version Number	Date	Approval Reference
1	First Draft			Oct 2006	ASL

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1. Software Requirements

You will login the WCMS and go to the Web Publisher (WP) user interface to manage your web content. Your computer must have the following software installed:

1. Web Browser: the supported version are

Platform	Brower Name	Version
Windows	Internet Explorer	6.0
	FireFox	1.5
	Netscape	7.2
Mac OS	FireFox	1.5
	Netscape	7.2
Unix/Linux	Mozilla	1.7
	FireFox	1.5

2. Java Runtime Environment, supported version are 1.4.2 or above. You may check the current version in the Control Panel settings. If your computer hasn't installed the Java Runtime Environment, please follow the step below to install it.

Install JRE (Java Runtime Environment) plug-in

Before using Web Publisher, user must install java plug-in on their computer. The required version is 1.4.2_08 or above. The plug-in can be downloaded at:

http://wcms.scig.hksarg:8080/wp/plugins/j2re-1_4_2_08-windows-i586-p.exe

Or

http://java.sun.com/j2se/1.4.2/download.html (Sun Java web site)

Installation Procedure

1. After the download, double click the executable file.
2. The License Agreement windows displays. Select "Accept" to accept the Agreement then click "Next"
3. The Installation Mode windows displays. Leave the default settings and click "Next"
4. The installation process start.
5. After the installation is completed, restart your computer

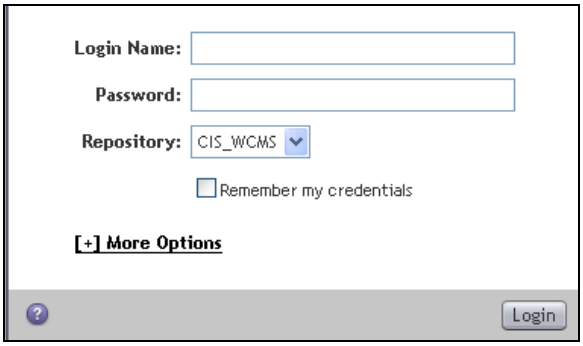
2. Connection to SSLVPN

Please refer to the WCMS-SSLVPN connection guide for the details on the connection to the SSL/VPN server before login to the WCMS.

3. Login to WCMS

3.1 How to login

User can type in **http://hostname:8080/wp** (where the 'hostname' should be **wcms.scig.hksarg** for the WCMS server) in the address field of your browser to enter the login page of Web Publisher.



1. Type in User Name, Password
2. Select an appropriate repository. Choose "**CIS_WCMS**" for the storage on the production server.
3. Click the **Login** button to login to the Web Publisher.

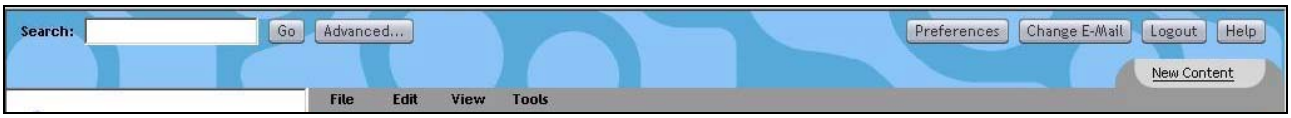
3.2 How to logout

Click the icon from the top menu bar to logout from Web Publisher

4. Setting Preference

Preferences determine your personal settings and are stored in a cookie on the machine from which you accessed Web Publisher. If you delete the cookie, you will loose your preference settings.

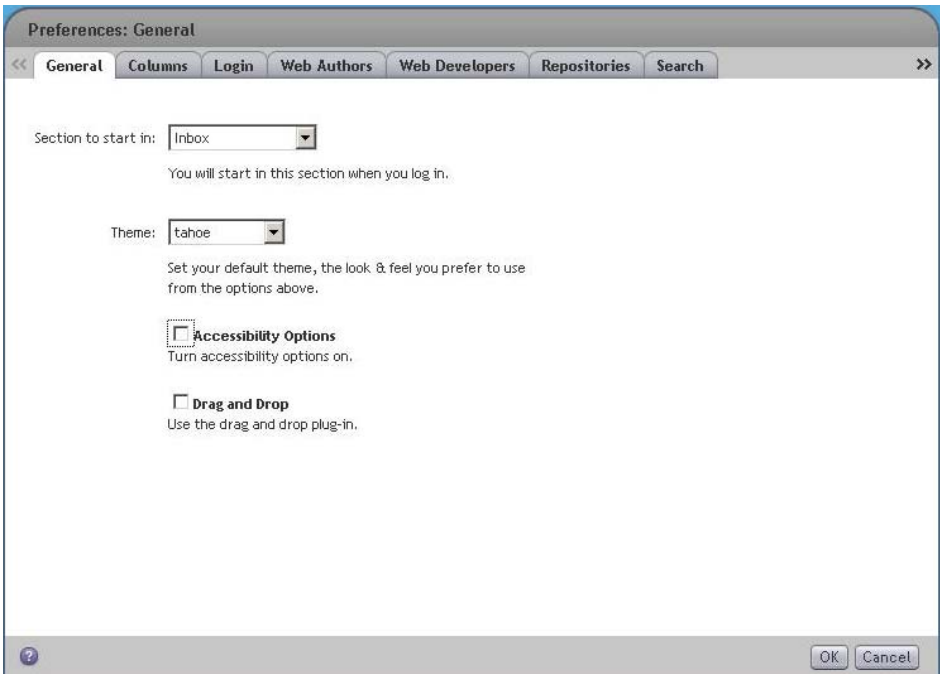
Press the Preferences button from the top menu bar to set your own preference



There are three important tags that we concern. The three tags are **General**, **Web Authors** and **Web Developers** respectively.

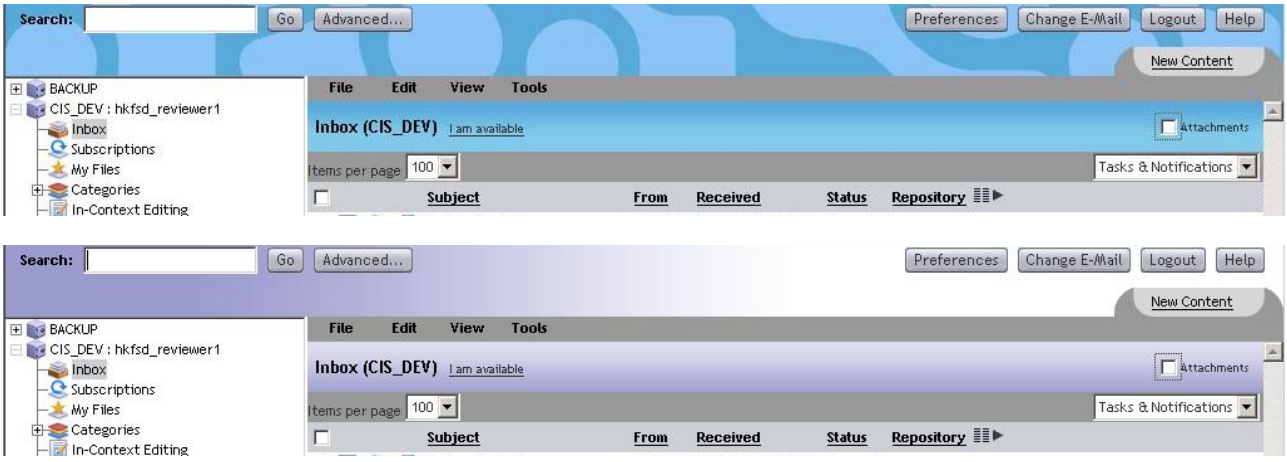
4.1 General setting

You can select your default location, theme and drag and drop feature under the **"General"** tag in the Preferences settings.



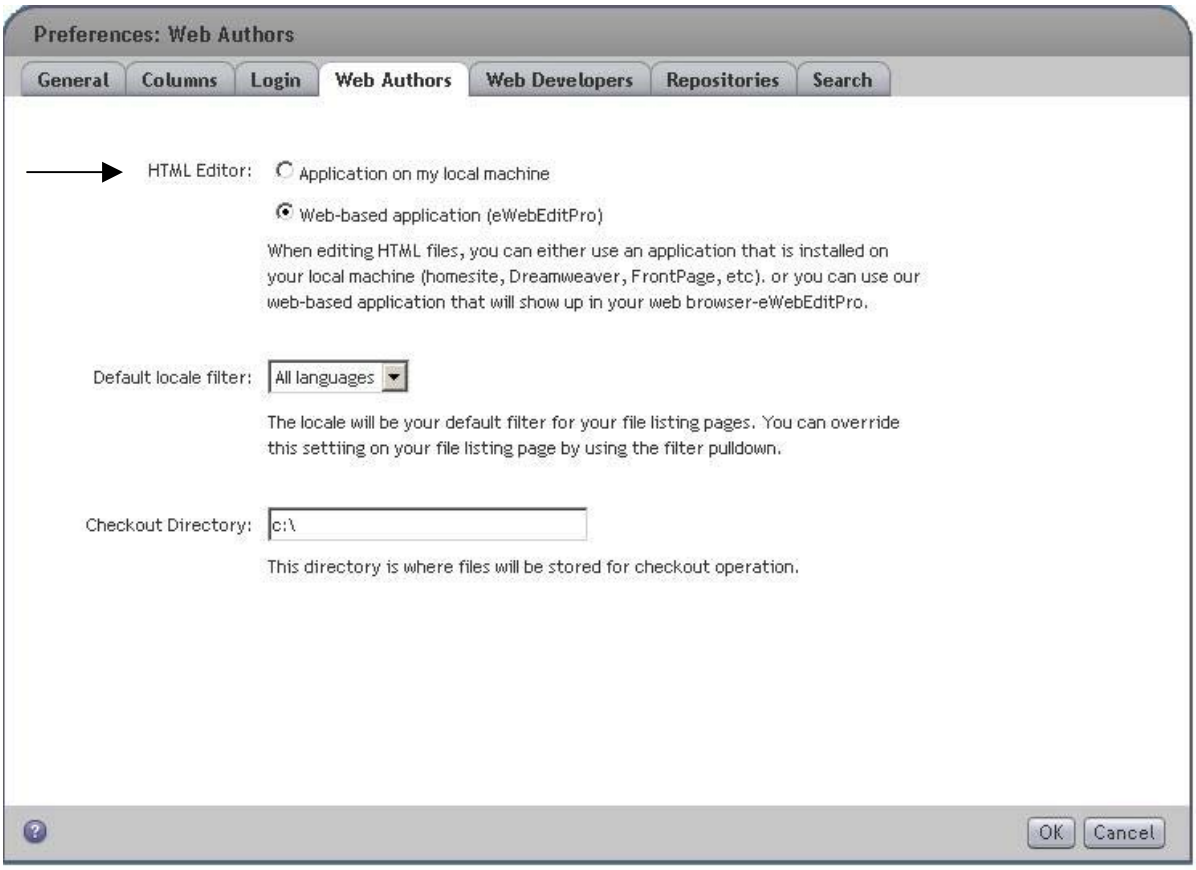
For example, you can select the theme for your preference

Let's try to change the theme from **tahoe** to **royale**



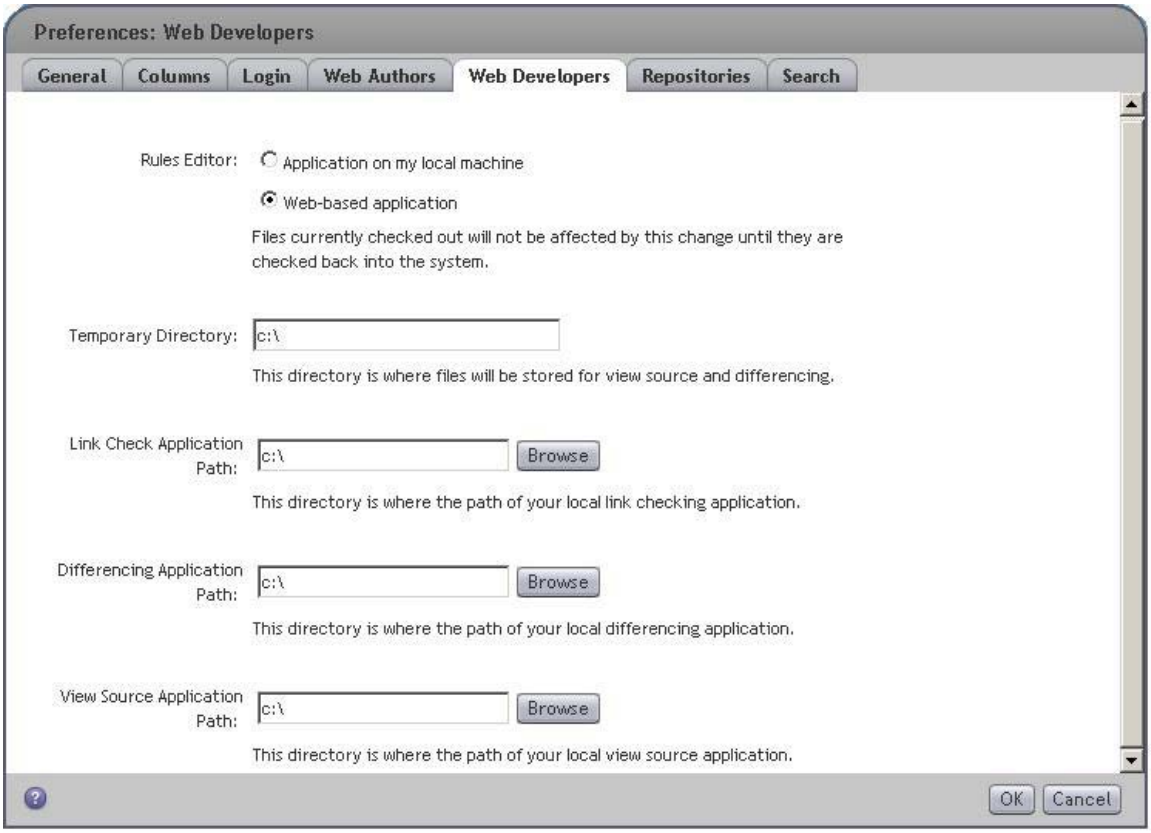
4.2 HTML Editor setting

When you edit HTML files, say by checking the file and click **File->Edit** option from the top pull down menu, or clicking the "Edit" shortcut link, Documentum will search for the option you have chosen in the **HTML Editor** under the **"Web Authors"** tag in the Preferences setting. You can either use an application that is installed on your local machine or you can use the default web-based application (e-WebEditPro).


Preferences: Web Authors
General
Columns
Login
Web Authors
Web Developers
Repositories
Search
HTML Editor:
Application on my local machine
Web-based application (eWebEditPro)
When editing HTML files, you can either use an application that is installed on your local machine (homesite, Dreamweaver, FrontPage, etc). or you can use our web-based application that will show up in your web browser-eWebEditPro.
Default locale filter:
All languages
The locale will be your default filter for your file listing pages. You can override this settiing on your file listing page by using the filter pulldown.
Checkout Directory:
c:\
This directory is where files will be stored for checkout operation.
OK
Cancel

4.3 Application path setting

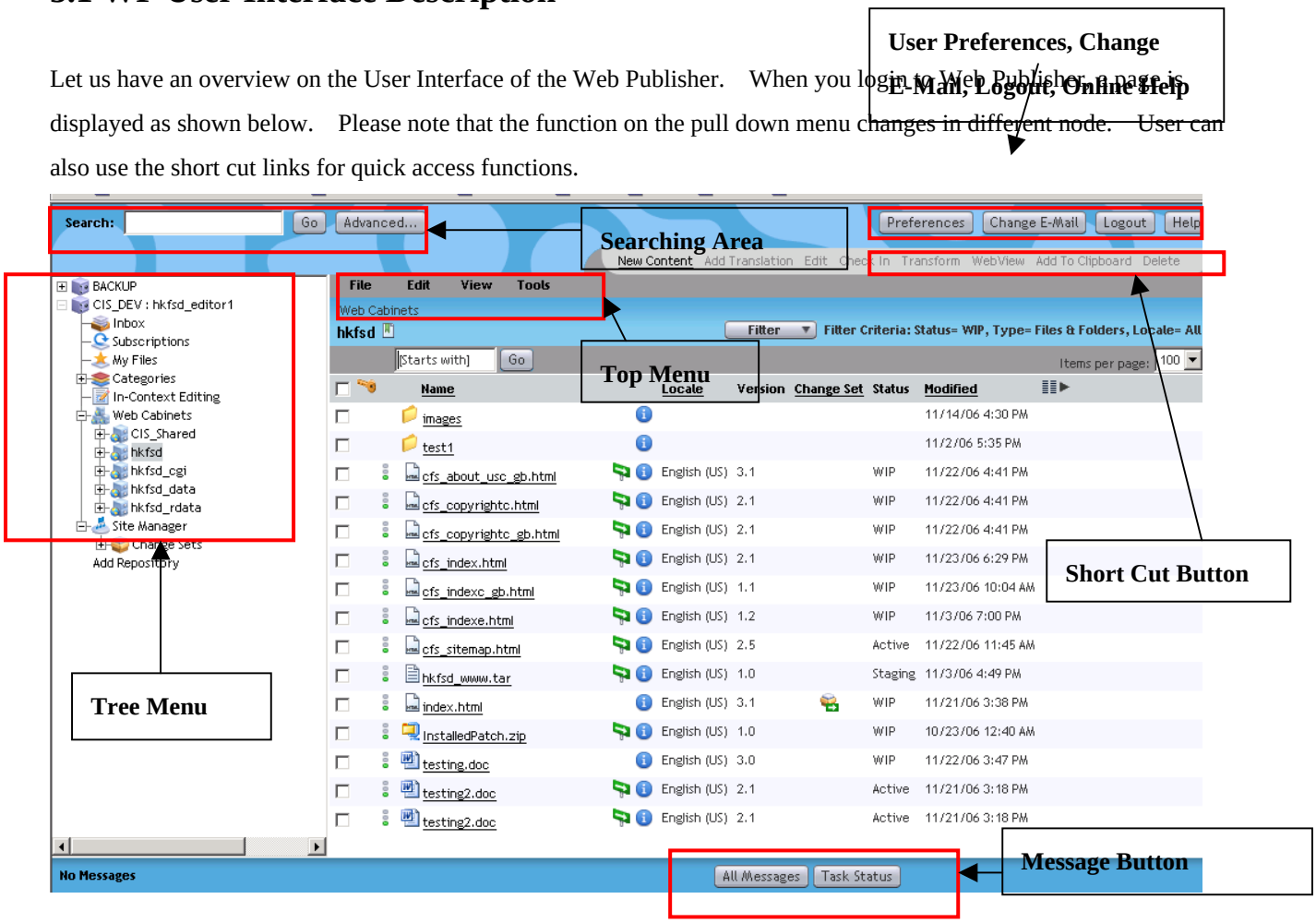
You can set the application path under the "**Web Developers" tag**. You can define the default editor to be used to edit rule files (for template developers only). You can set the temporary directory for viewing source code, view source application path**.**


Preferences: Web Developers
General
Columns
Login
Web Authors
Web Developers
Repositories
Search
Rules Editor:
Application on my local machine
Web-based application
Files currently checked out will not be affected by this change until they are checked back into the system.
Temporary Directory:
c:\
This directory is where files will be stored for view source and differencing.
Link Check Application Path:
c:\
Browse
This directory is where the path of your local link checking application.
Differencing Application Path:
c:\
Browse
This directory is where the path of your local differencing application.
View Source Application Path:
c:\
Browse
This directory is where the path of your local view source application.
OK
Cancel

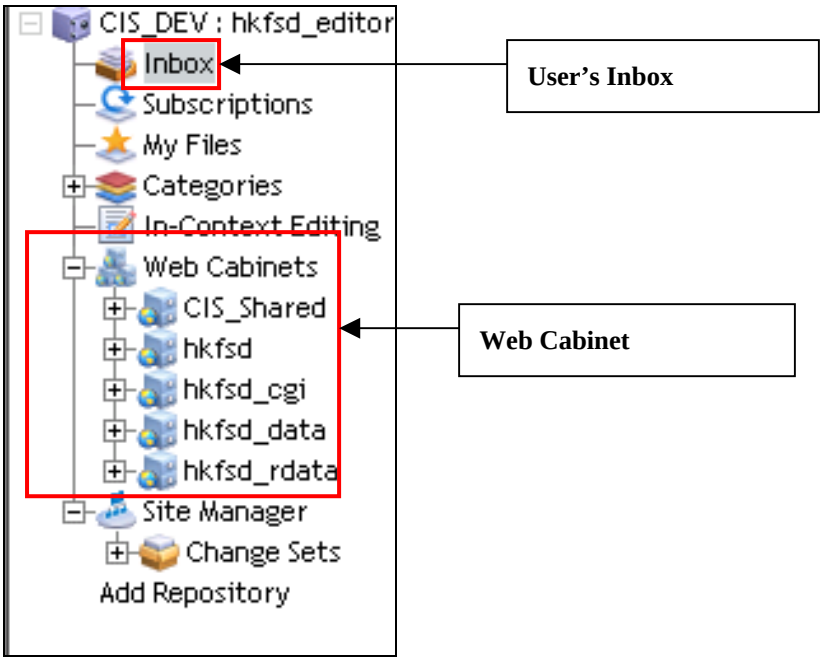
5. Basic Navigation

5.1 WP User Interface Description

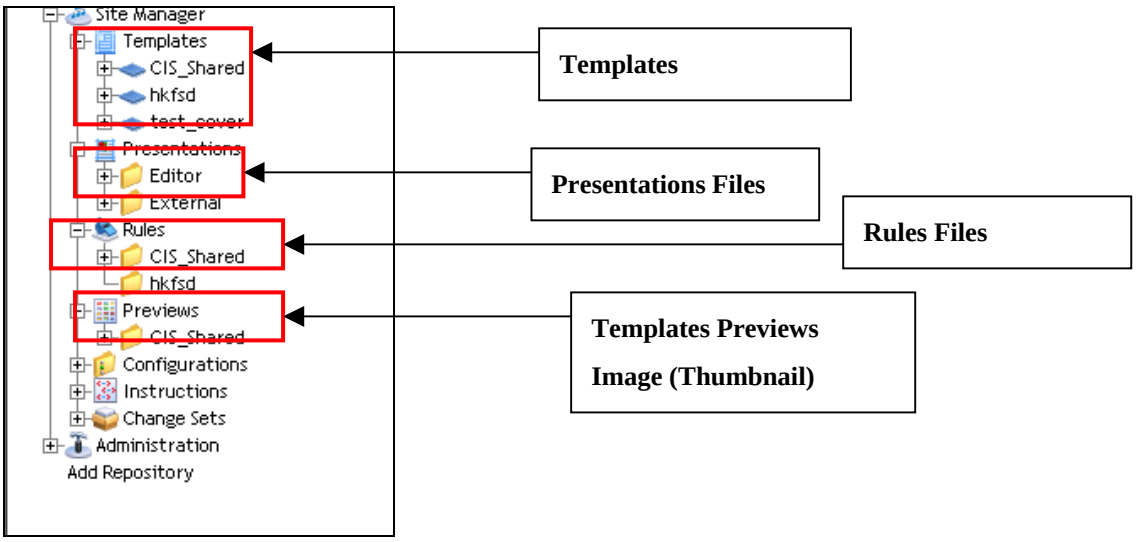
Let us have an overview on the User Interface of the Web Publisher. When you login to Web Publisher, a page is displayed as shown below. Please note that the function on the pull down menu changes in different node. User can also use the short cut links for quick access functions.



Tree Menu for Content Editor



Tree Menu for Content Developer



5.2 Setting Filters

In WP view, you can filter the content listing by the following criteria.

Filter by Version or Type

You can use the filter button to narrow the type of items displayed in a list.

The

button, which is located in the menu bar, as shown below, allows you to apply multiple filters at once.

The filter setting would be shown next to the filter button.

By clicking the

button, you can filter by item type, locale or status.

In the **Status** filter, the file status that is later than the selected one will be shown. Details are listed as follows:

Selected Status	Version will be show
WIP	WIP, Staging, Approved, Active
Staging	Staging, Approved, Active
Approved	Approved, Active
Active	Active
Expired	Expired
All	WIP, Staging, Approved, Active, Expired

Filter by File Name

You can type in some keywords to replace the [Starts with] text. Press the Go button to narrow the item displayed in the list.

Filter by Number

You can choose the number of items to be shown in a page from 10, 50 or 100.

5.3 Sorting

There is a sorting bar on the top of the items. By clicking the underlined text on the sorting bar, the items will be displayed from ascending or descending order.

By clicking the icon, you can select the properties that appear in the lists and change the order in which the columns for the properties appear.

5.4 Searching

There are two types of search functions **Simple Search** and **Advanced Search.**

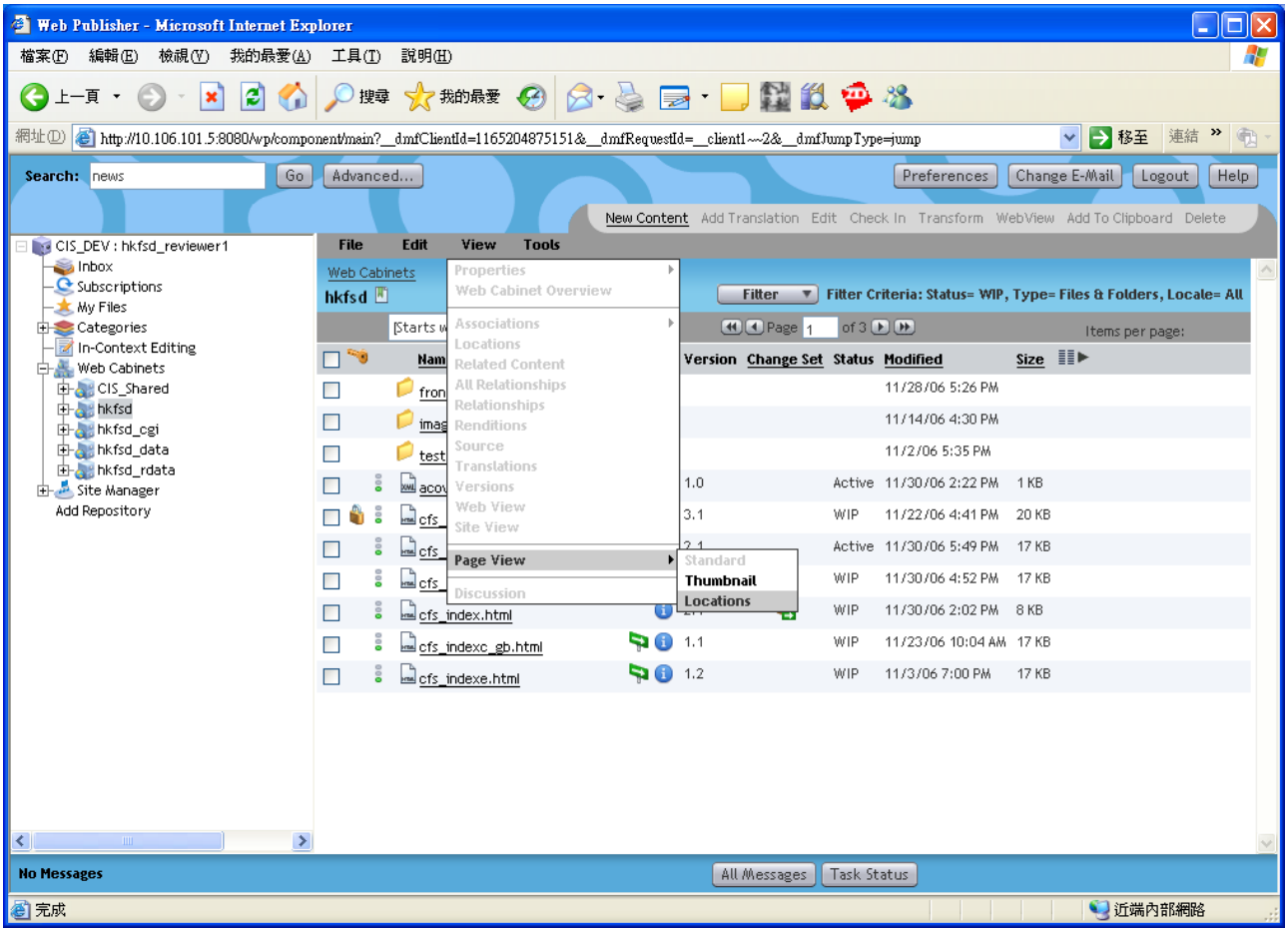
Simple Search

A simple search returns documents that have at least one of your search words. The search results first display documents that have all your search words and then, second, display documents that do not have all the terms but have at least one in the whole WCMS.

You can perform simple search by typing the word in the **Search** field in the top menu bar.

After the Go button has been pressed, a list of documents which match the searching criteria will be displayed.

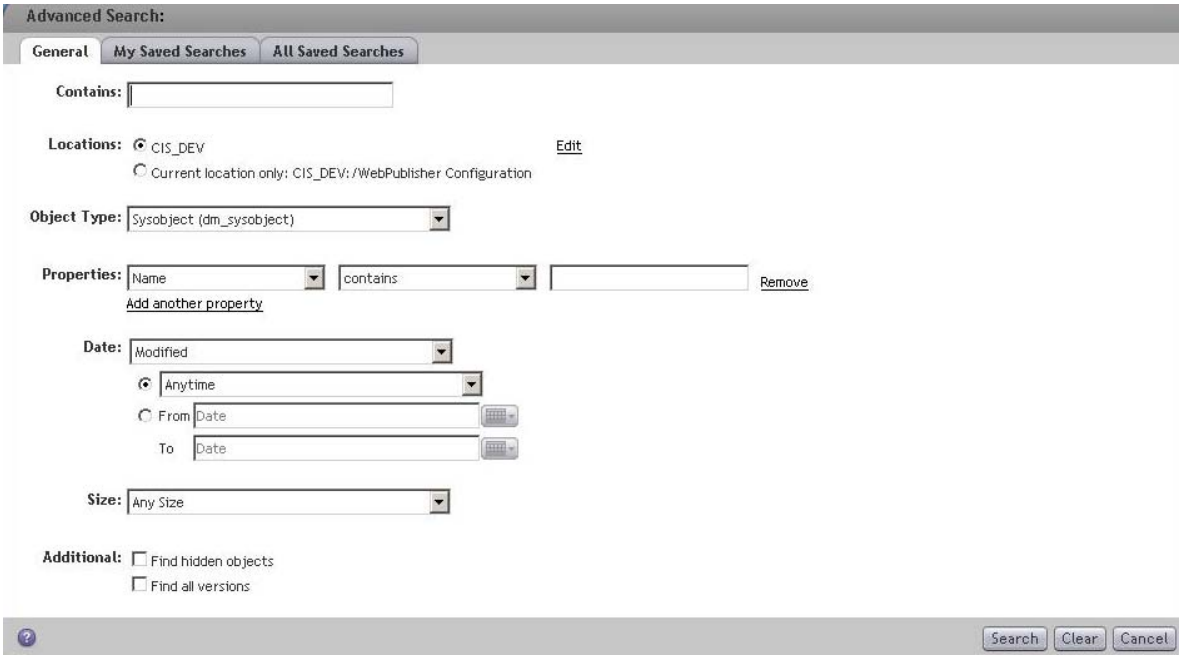
To view the full path of the files, you can select **View** => **Page View** => **Locations** from the pull down menu.



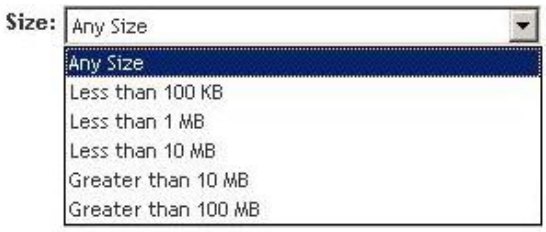
Advanced Search

An advanced search allows you to add selection criteria to your search.

You can perform the advanced search by clicking the Advanced... button from the top menu bar.



You can specify the size, status, date of the object you are searching.



Example of Advanced Search

This is an example to search files which have a file name consists of “head” under the web cabinet named “citb”.

1. Click on the Advanced... button from the top menu bar
2. Click on the **Edit** button next to the **Location** field
3. Choose **citb** in the **Location** page
4. Select Document (dm_document) for the setting of object type
5. Type “head” in the right most field from the **Properties**

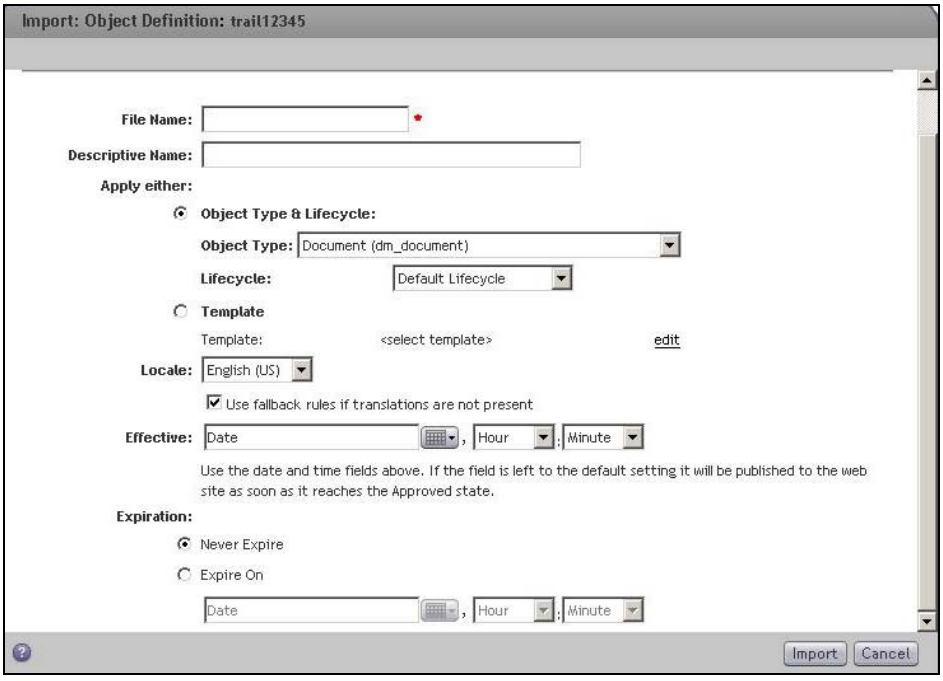
6. Press **Search** button from the bottom

6. Importing & Exporting files

6.1 Import files/folders

A local file can be easily imported by clicking the **File → Import** button in the pull down menu.

Click the **Add Files** button to browse and select the desired files or Click the **Add Folders** to import a whole folder (including all the folders and files underneath). However the maximum number of items to be imported is 1000 each time.


Import: Object Definition: trail12345
File Name:
Descriptive Name:
Apply either:
Object Type & Lifecycle:
Object Type: Document (dm_document)
Lifecycle: Default Lifecycle
Template
Template: <select template> edit
Locale: English (US)
Use fallback rules if translations are not present
Effective: Date Hour Minute
Use the date and time fields above. If the field is left to the default setting it will be published to the web site as soon as it reaches the Approved state.
Expiration:
Never Expire
Expire On
Date Hour Minute
Import
Cancel

You can edit the file name and select Object Type and Lifecycle for the imported files

Click the **Import** button to start the import process.

Troubleshooting on importing folder

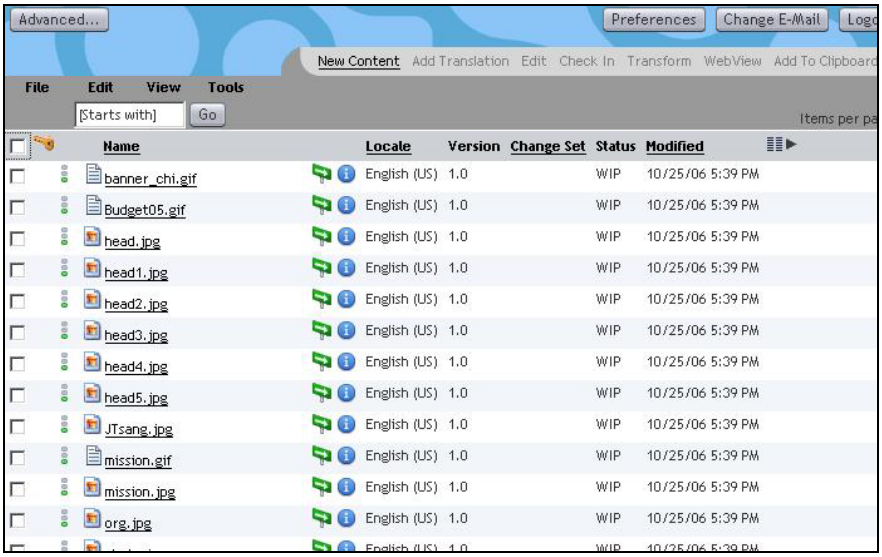
If you are going to clean up the cookies from the web browser, you will be unable to import folder though you press the **Next** or **Import** button since no default lifecycle is assigned to the document inside the folder.

You are advised to import file and assign lifecycle to it before trying to import folder if you have cleaned the cookies or the first time WP run on a computer.

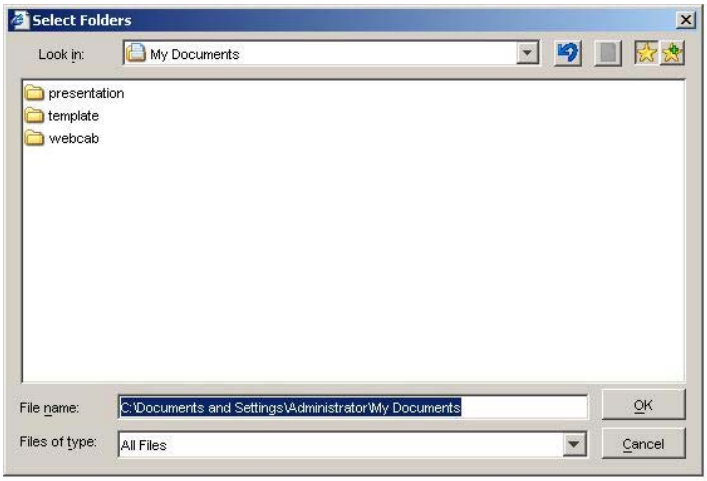
6.2 Export files

You can export files (but not folders) with the **Export** function in the pull down menu.

You can check the check box of your desired file(s) under a specific folder



Click **File → Export** on the pull down menu.



Select the output directory and click **OK** button to execute the export process.

7. Viewing and editing a document

7.1 Viewing a document

There are two methods to view the content of a document.

1. View by local computer application: You view the document using your computer default application of the viewing document type. For example: if you are viewing a plain text document then notepad will be used. But the limitation is that if you try to view an html page by view then you may be unable to view the image or other file inside the html page. As the browser cannot find the file according to the path. In this case you need to use **Web View.**
2. Web view: You view the document with a web browser. And all images or stylesheets will be displayed so that you can view the output of the web page as what you will see after publishing to the web server. But the limitation is that only browser supported format can be Web View. You cannot web view a javascript or stylesheet files.

View by local computer application

The content of the document can be viewed by checking the check box of the document and clicking **File → View** in the pull down menu

Click on the name of the document can view the content of the document, too.

The application which you have done the association for the specific file type would be launched.

WebView a document

A document can be previewed in a Web Layout View by using the WebView function.

You can check the check box of the document and click **View → WebView** button to call the Web View function.

Be attention that there is a green light between the document's name and document's check box when the document support Web View function.

7.2 Check-In / Check-Out a document

The check-out function locks the document when a document is being edited to avoid users from editing the same file at the same time. The document would be check-in when the editing is finished. When you check a document out, the document will be placed into a check-out directory which you have set in the **Preference** setting.

To Check-Out a document

Check the check box of the document and click **File → Check Out** to check out the document.

To Check-In a document

Check the check box of the document and click **File → Check In** to check in the document

To Check the Check In/Out Status of a document

When a document is being checked out, there is an icon next to the document's name.

When a document is being checked out by others, there is an icon instead. Then you cannot edit but only export or view the file.

To cancel check-out

You can cancel the check-out of a document with icon by checking its check box and click **File → Cancel Checkout** from the top pull down menu.

All revision of the content of the document will be lost if you **Cancel Checkout** a document.

7.3 Editing a document

In WP, the edit action would also include checking out a document. In other words the document would be automatically checked out when you edit a document. There are two types of document you may edit, one with template and other without template. For editing documents created from template, you must use the WP Editor. For other content, WP will use your computer default application to open the document. For example, if you select edit a text file in WP then WP will open your computer text editor to you. Then you will need to edit the opened document, save it locally and check in it from WP.

Editing a HTML file

You can edit a HTML file placed in the Web Cabinet

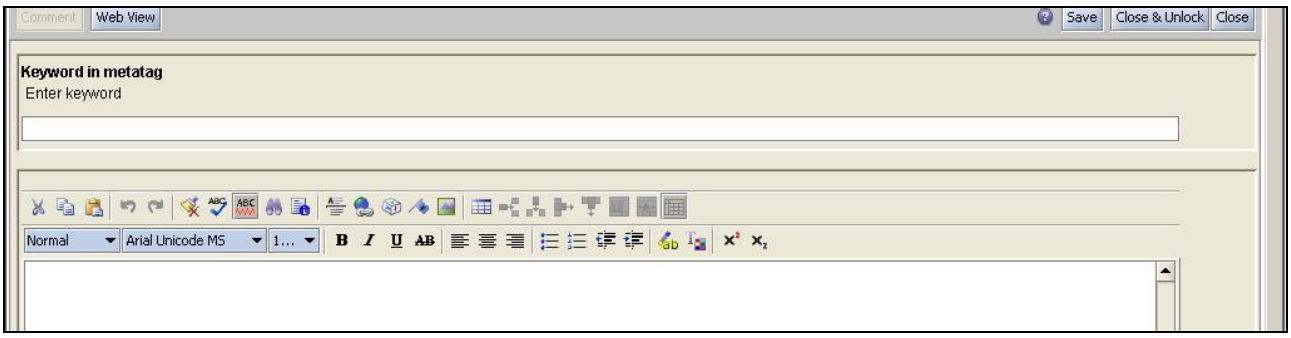
1. Check the check box of the file
2. Click **File** from the pull down menu
3. You can click **Edit** or **Native Edit** to edit the file
   - When you choose **Edit**, the editor as selected in the Preference tab would be launched. For details, please check from the **HTML Editor Setting** in **Preferences** section.
   - When you choose **Native Edit**, the editor as default in your file association setting would be triggered.

Editing a content file created from template

You can edit a content file created from template as follows:

1. Check the check box of the file.
2. Click **File → Edit** from the pull down menu.
3. A content editor is shown as below:

Web Publisher Editor User Interface

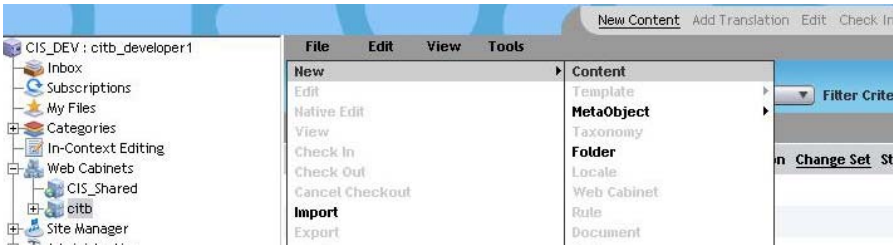


The user interface of the Web Publisher Editor would be different as the look and feel depends on the definition of the rule file. Below are the functions of each button:

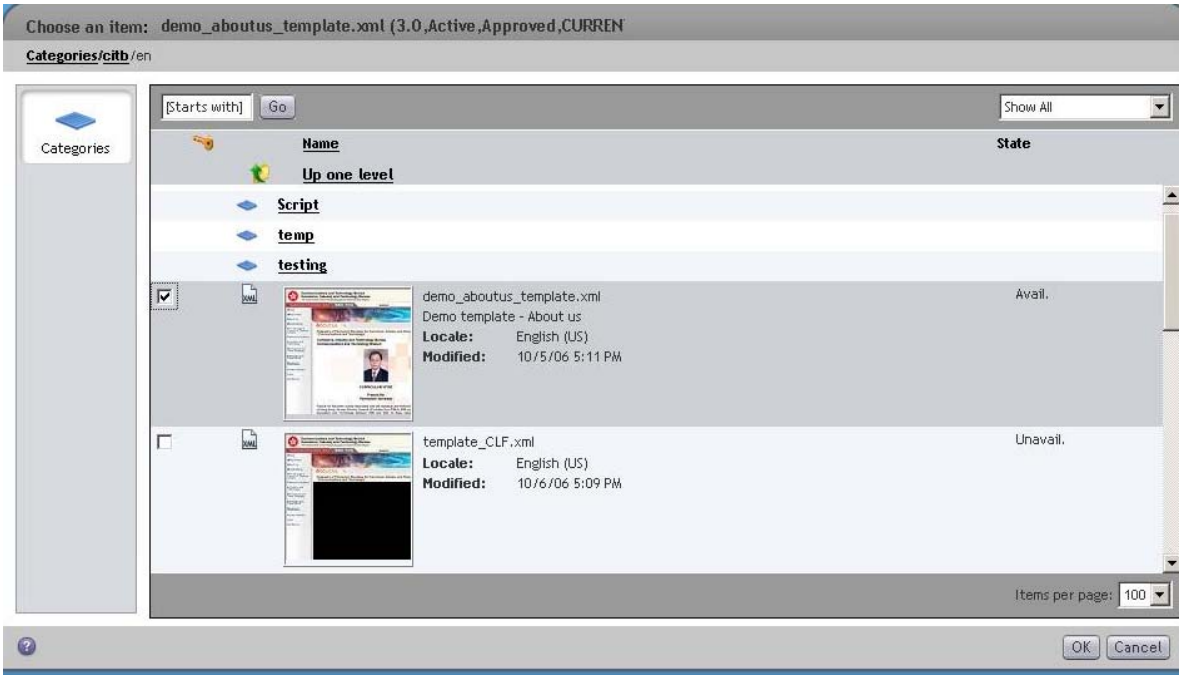
4. Revise the information and press **Save** button
5. You can optionally click the **Comment** button to set the comment for the document.
6. Then you can press **Web View** to view your change.
   A. If the change is **OK** you then Press **Close & Unlock** button to you finish your change and exit from the WP editor.
   B. If the change is **Not OK** and you want to rollback the document then you should Press **Close** to exit from the WP editor. And in WP cancel check out the document to retrieve the previous version.

7.4 Creating a new web file from a template

1. Navigate to the desired location you want to create a new content template on it.
2. Click **File → New → Content** in the top pull down menu or select the shortcut link **New Content**.

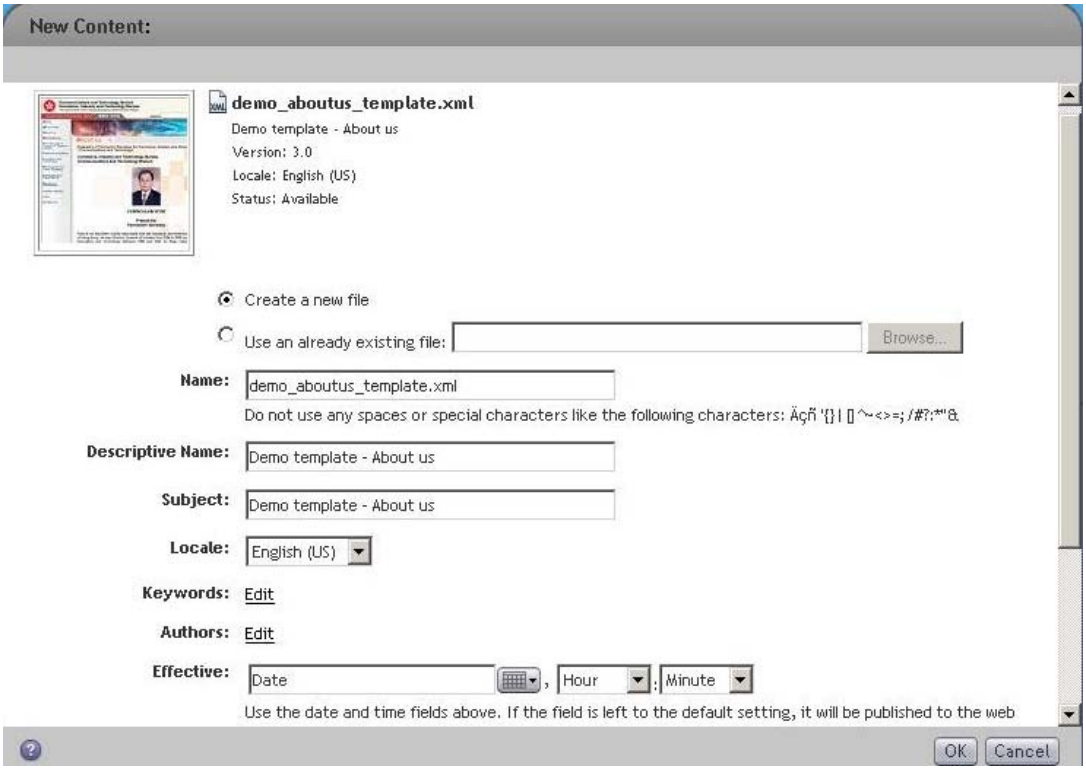


3. Choose a template you are basically reference on it.
4. Check the checkbox of the desired template and click the **OK** button.



5. You can assign a new name for the content file.
6. You can set the effective date and/or expiry date for the content file.

7. Click the **OK** button.



You can check the checkbox to edit the content file right away.

7.5 Delete Document / Folder

Check the check box of the document or folder and click **File → Delete** button to delete the document. You can delete multiple files or folders at the same time.

Limitation of deleting folder

The following states the condition that a folder cannot be deleted:

1. User without **delete privilege** on the desired folder.
2. The folder is not empty.

Limitation of deleting document

The following states the condition that a document cannot be deleted:

For documents:

1. User without **delete privilege** on the desired document.
2. When the document's current version is in **Active** state or previous version of the document is in **Active** state.
3. When the document is being checked out.
4. When the document is included in a workflow.

For templates:

1. Template is mark as **Available**.
2. Template is referred by a/some content in web cabinet. It means that the content is generated by the template.

For presentation and rule files:

1. File is referred by other document

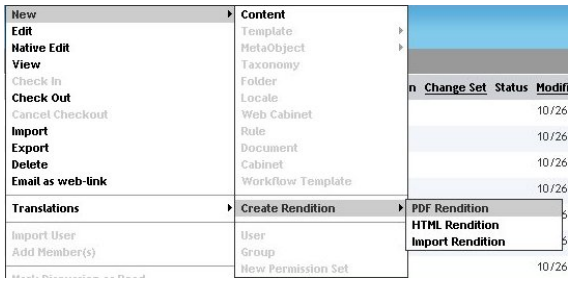
8. Transforming document into different formats by Rendition

In WCMS, a document may have more then one rendition such as html, PDF, word etc. You can transform the Microsoft documents (Word documents, Excel spreadsheets, Powerpoint slides) into different formats like PDF, HTML.

8.1 Making a HTML/PDF rendition

WCMS contains a Transformation Server which allows you to transform a Plain Text, Word, Excel and Powerpoint file to a PDF or HTML file through WP.

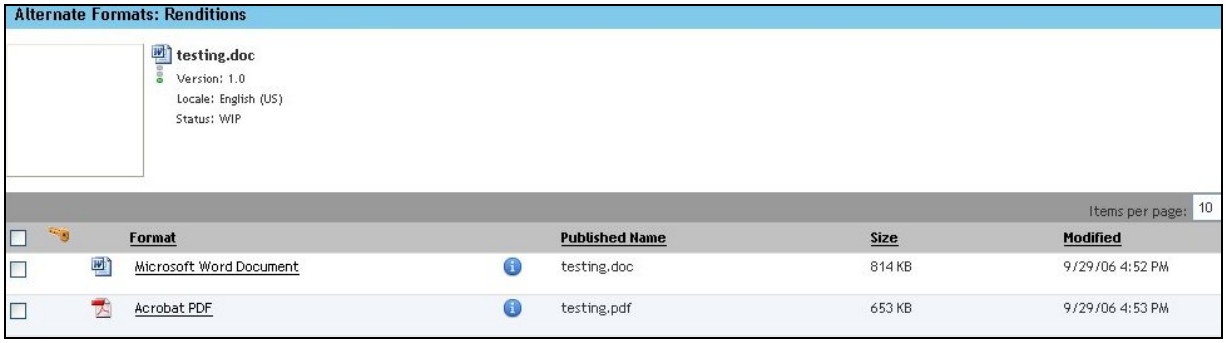
1. Select a document you want to transform.
2. From menu **File → New → Create Rendition,** select **PDF Rendition** or **HTML Rendition**



3. After clicking the menu, it will generate the rendition accordingly. User can view the rendition after one or two minutes to check the result. If there are problems with the rendition generation, you will receive a message in your inbox.

8.2 Viewing rendition

1. Select a file.
2. Click **Rendition** from the **View** menu
3. Then a list of rendition will be shown. The first one is primary rendition. It cannot be deleted unless you delete the file.



4. You can select each rendition for viewing, or exporting as another file as required.

8.3 Delete a rendition

To Delete Rendition

1. Select a rendition you want to delete.
2. Then click **Delete** button on the top right hand corner.

9. Publish a document with workflow

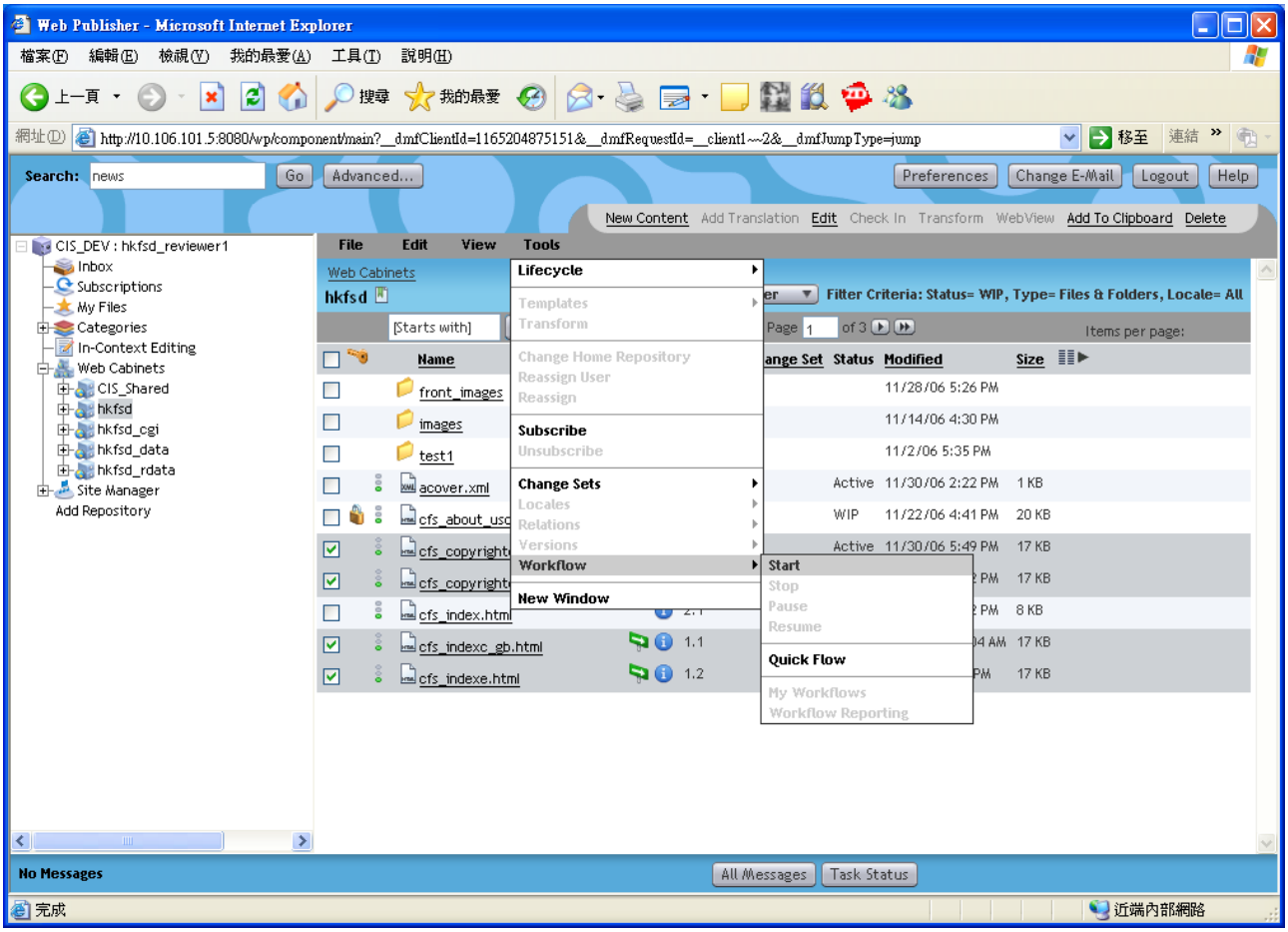
Workflow can be started by content authors or reviewers.

There are two types of workflows:

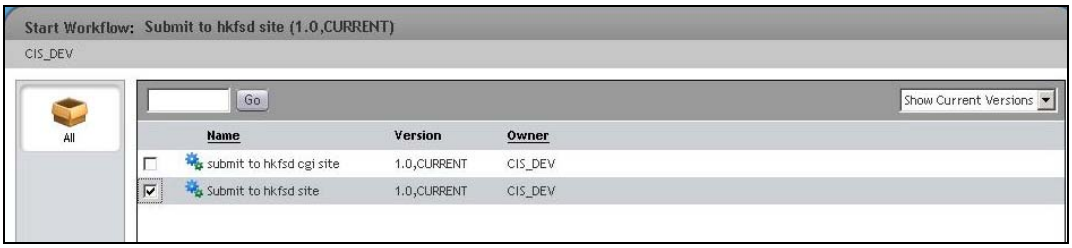
1. Approval for site (started by content author)
   - When the workflow is submitted, the documents in the workflow will be routed to the content reviewer for approval.
2. Auto publish to site (started by content reviewer)
   - When the workflow is submitted, the documents in the workflow will be published directly to the staging and production web server.

9.1 Starting a workflow

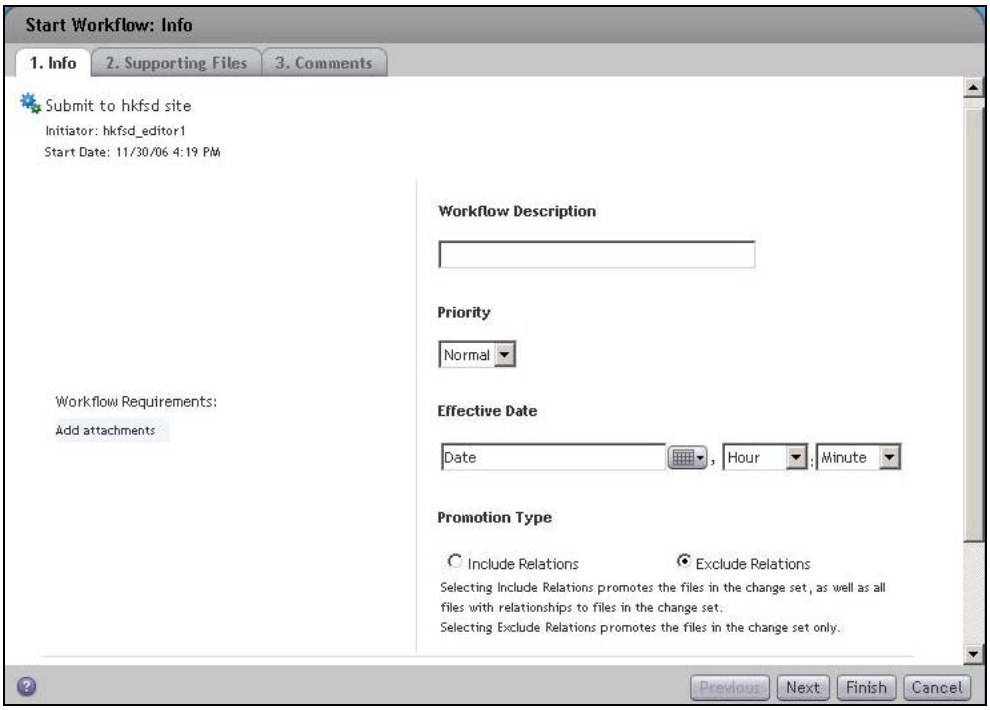
1. Select the file you want to publish to the web server.
2. Click the Start Workflow button next to your desired document
3. Or you will have to select from the pull down menu if you include more than one document in a workflow.



4. Select the workflow by checking its checkbox and press the **OK** button.



5. Fill in description in the description field and press the **Finish** button.

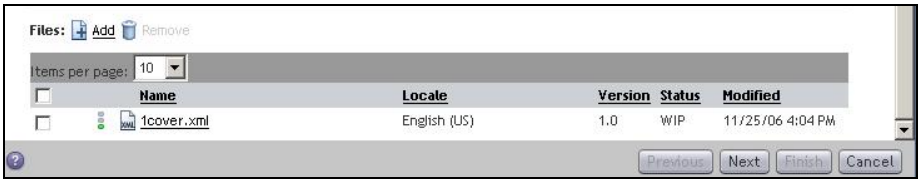


An icon will be shown next to the document which has a workflow started on it.

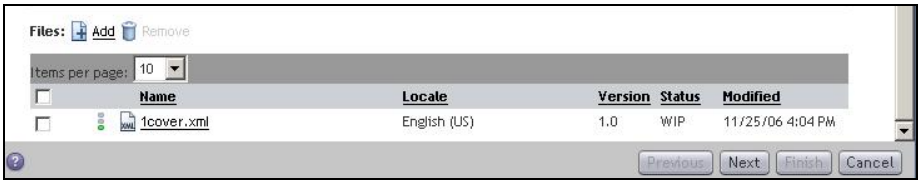
9.2 Adding documents in a workflow

During the configuration of starting a workflow, you can add more than one document to the workflow in the **Info** page. For the detail of getting in this page, please refer to section 9.1.

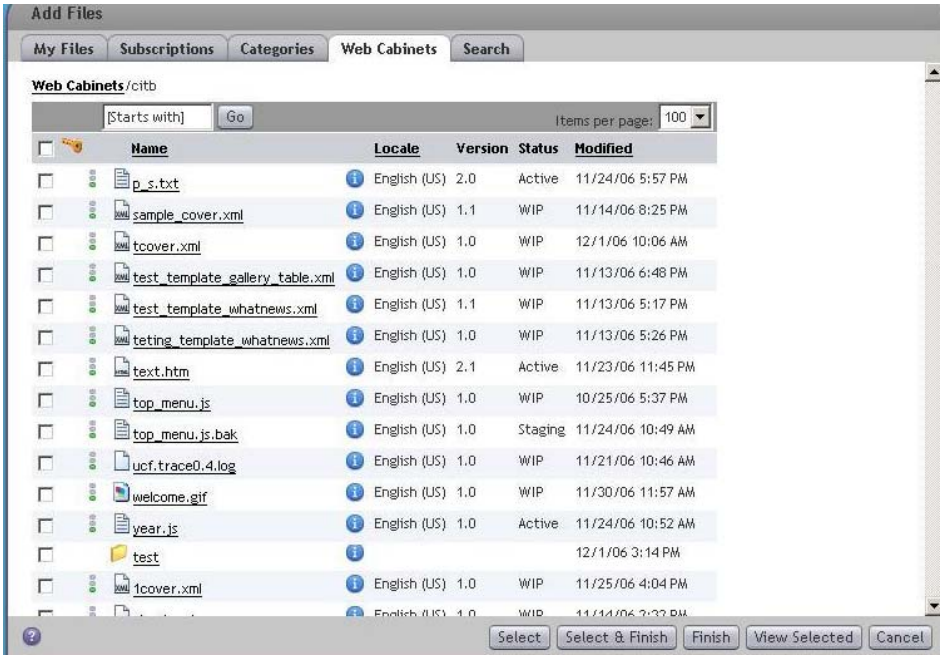
There is a **Files** option at the bottom of the **Info** page



1. Press the button to add document to the workflow



2. Check the checkbox of the desired document and press **Select** button in the bottom to add document to the workflow

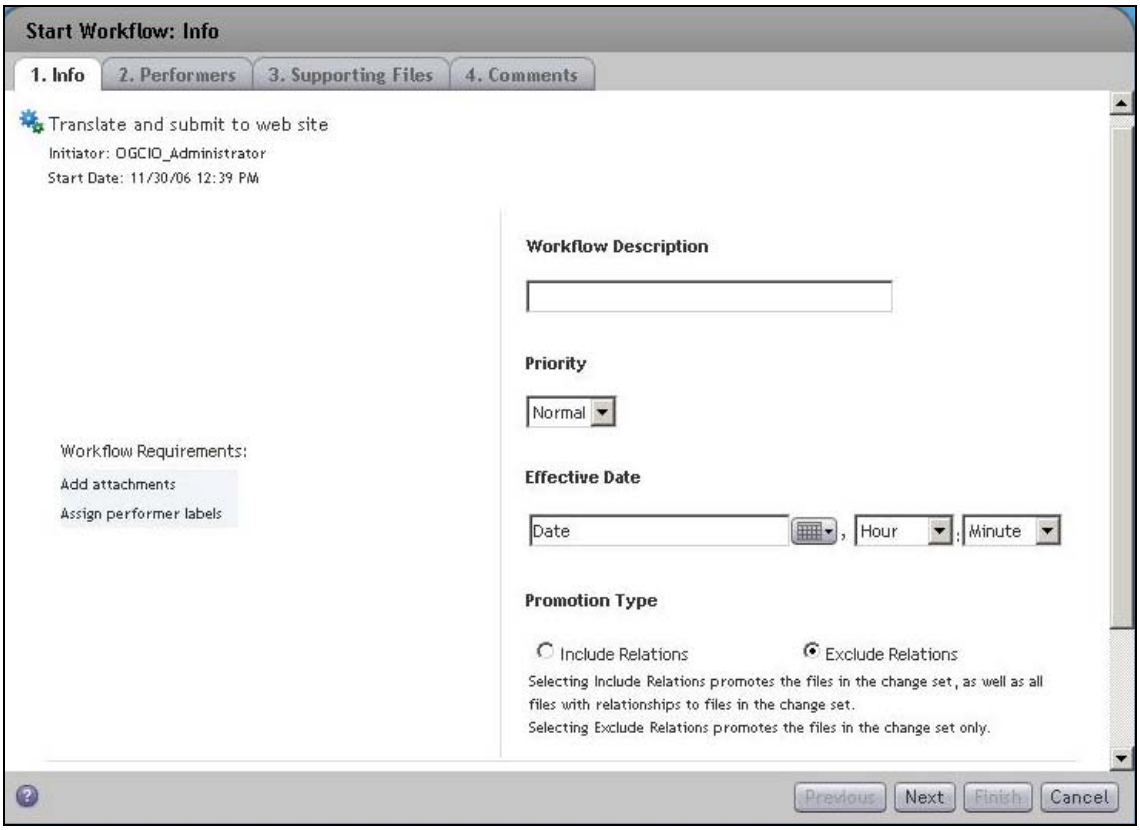

Add Files
My Files
Subscriptions
Categories
Web Cabinets
Search
Web Cabinets /citb
[Starts with]
Go
Items per page: 100
Name
Locale
Version
Status
Modified
p_s.txt English (US) 2.0 Active 11/24/06 5:57 PM
sample_cover.xml English (US) 1.1 WIP 11/14/06 8:25 PM
tcover.xml English (US) 1.0 WIP 12/1/06 10:06 AM
test_template_gallery_table.xml English (US) 1.0 WIP 11/13/06 6:48 PM
test_template_whatnews.xml English (US) 1.1 WIP 11/13/06 5:17 PM
teting_template_whatnews.xml English (US) 1.0 WIP 11/13/06 5:26 PM
text.htm English (US) 2.1 Active 11/23/06 11:45 PM
top_menu.js English (US) 1.0 WIP 10/25/06 5:37 PM
top_menu.js.bak English (US) 1.0 Staging 11/24/06 10:49 AM
ucf.trace0.4.log English (US) 1.0 WIP 11/21/06 10:46 AM
welcome.gif English (US) 1.0 WIP 11/30/06 11:57 AM
year.js English (US) 1.0 Active 11/24/06 10:52 AM
test 12/1/06 3:14 PM
1cover.xml English (US) 1.0 WIP 11/25/06 4:04 PM
Select
Select & Finish
Finish
View Selected
Cancel

3. Press **Finish** button at the end.

9.3 Setting the publishing time of documents in a workflow

During the configuration of starting a workflow, you can set the publishing time by choosing **Date, Hour** and **Minute** in the **Effective Date** field in the **Info** page.

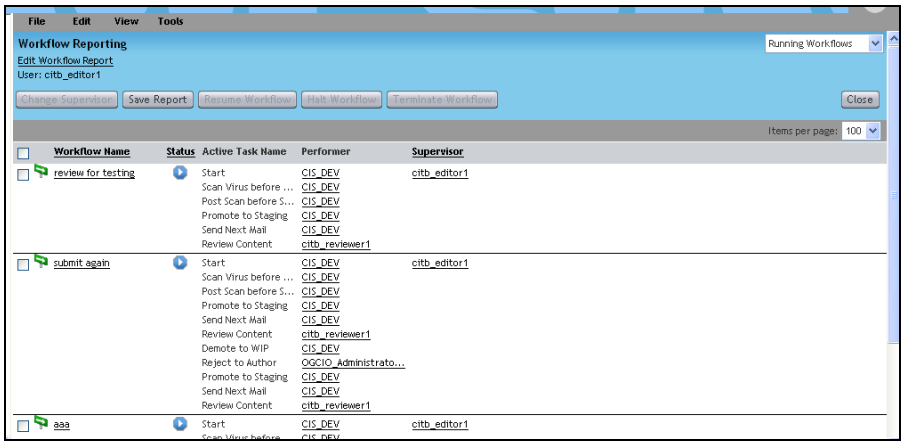
For the detail of getting in this page, please refer to section 9.2.



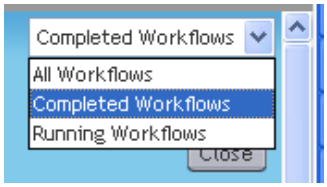
9.4 Workflow report

User can view report of running or completed workflow. You can follow the steps below to view the workflow report

1. Select **Workflow Reporting** from the pull down menu **Tools → Workflow**
2. Then a list of workflow display.



3. You can see the state of all workflow. The state includes the Workflow Name, Status (Running, Completed and Paused), Active Task Name and Performer of a task. Also you can Halt, Resume or Abort a workflow here.
4. You can use the filter to select running, completed or all workflows.



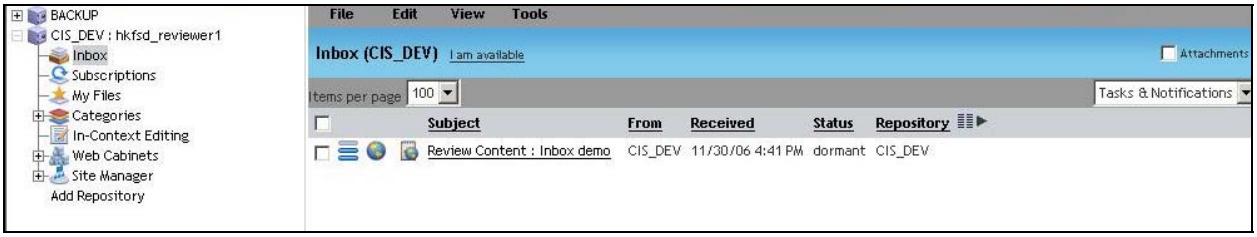
You can double click a workflow to view the detail of the workflow

9.5 Reviewing a workflow (for reviewer only)

The workflow started by content author should be approved by content reviewer in order to complete the workflow and publish to the web server.

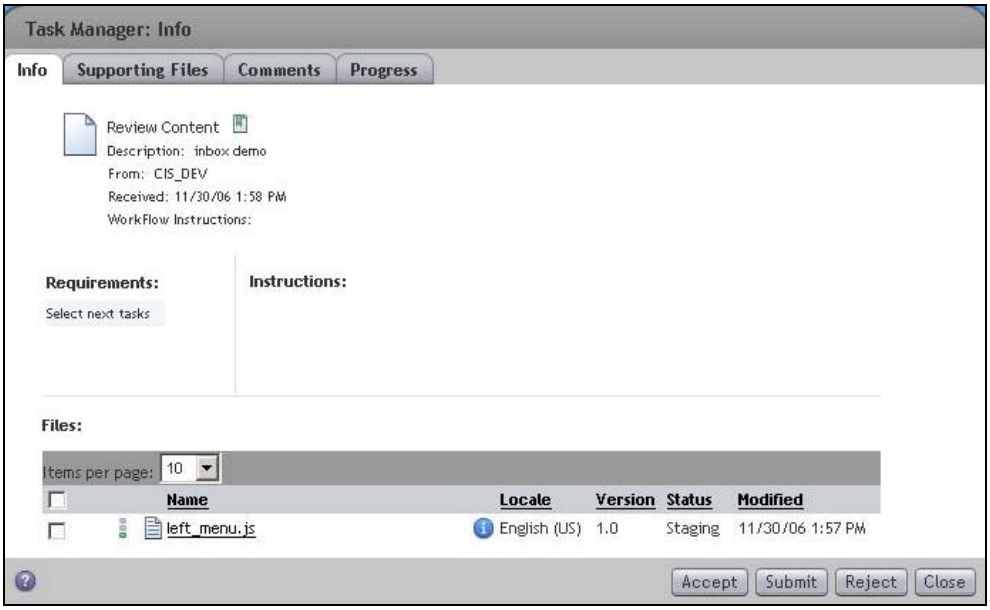
1. Login to WP as an reviewer and navigate to the **Inbox** node from the navigation tree.

2. Click on the subject name of the message



3. You should view the content on the attached file by clicking on its name

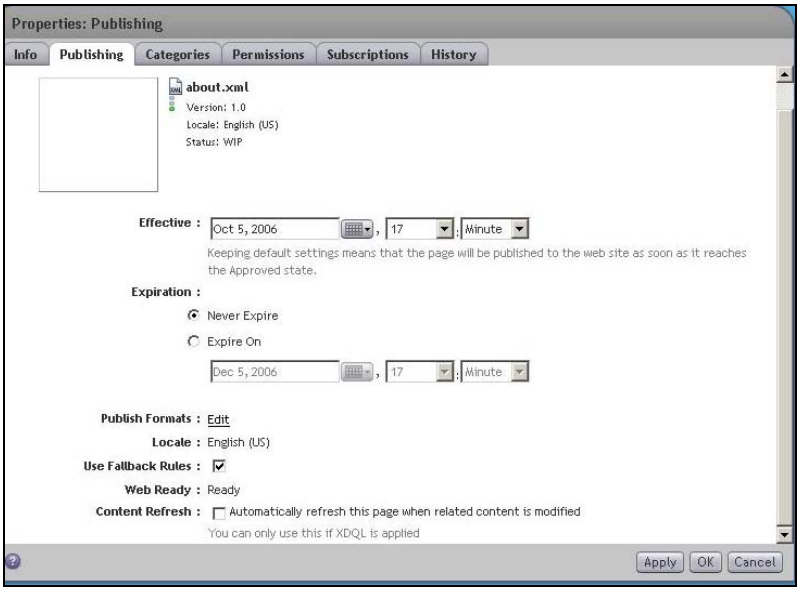
4. Press **Submit** or **Reject** button to approve or decline **ALL** the document(s) in the workflow.



10. Setting the document publishing and expiration time

You can set the publishing and expiration time of a document. The WCMS will check if the publishing time of a document if it is not defined in the workflow. It will expire and remove the document from the staging and production web servers when the document is expired. The publishing and expiration time will **ONLY** be effective when the document reaches the active status.

You can view and edit a document's information by pressing the icon next to the document



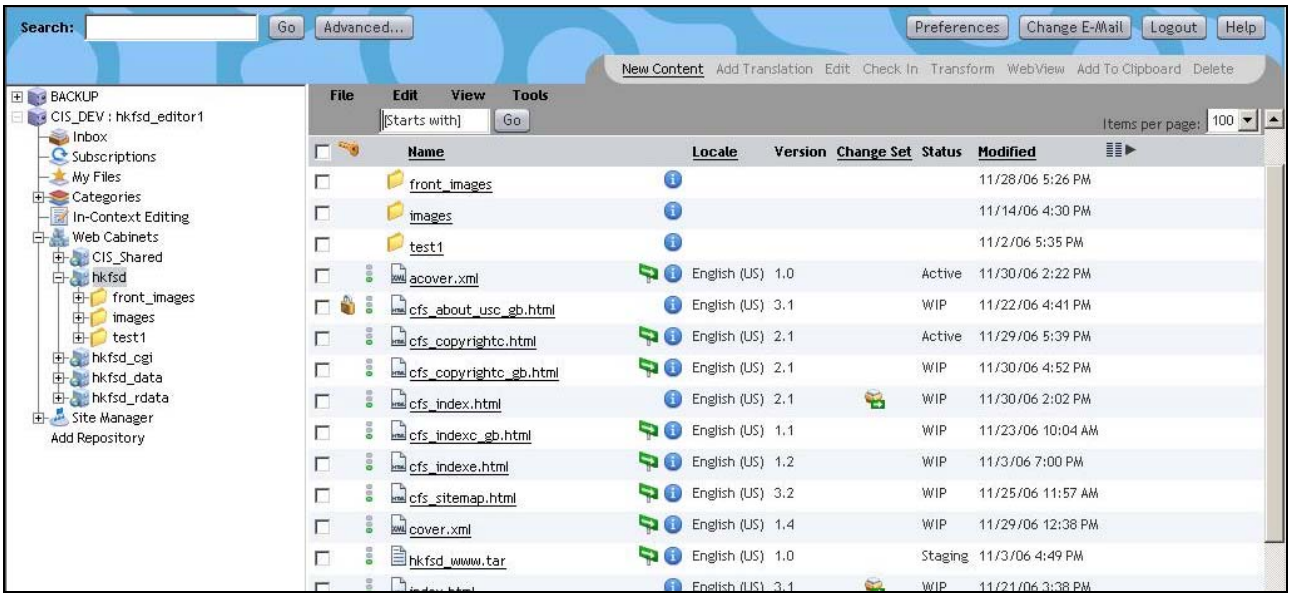
The **Effective** field allows you to set its publishing time

The **Expiration** field allows you to set its expiration time

11. How to check document status

The status of the document reflects the stages (WIP, Staging, Approved, Active, Expiry) in a lifecycle. The status of a document can be checked from the **Status** field along with the document.

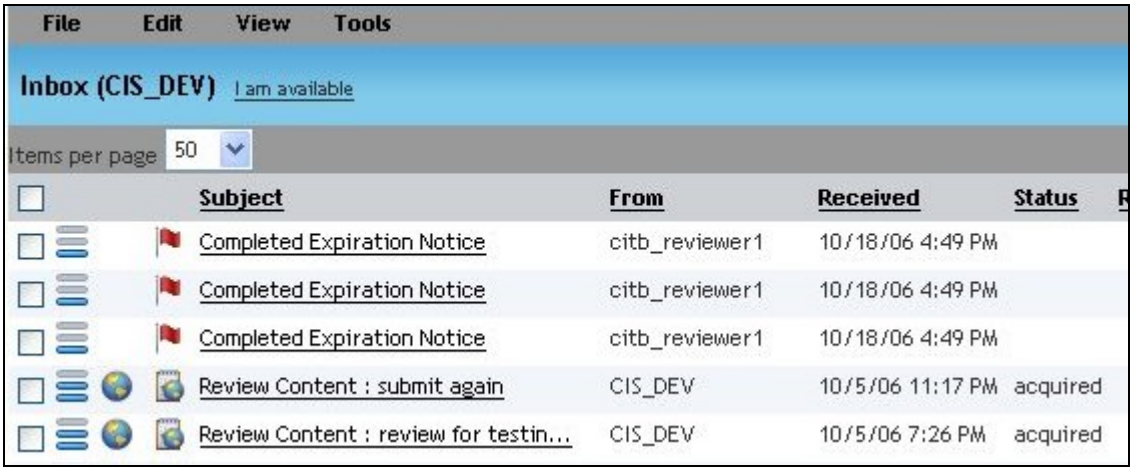
If there is an icon under the Change Set column it means that the document is in workflow. Then you cannot edit the document.



12. Notification

You can get notification by navigating to the **Inbox** node from the navigation tree on the left of WP

The **Inbox** page is shown when you click on the **Inbox** node

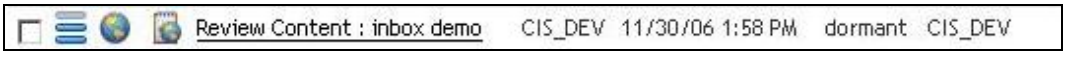

File Edit View Tools
Inbox (CIS_DEV) I am available
Items per page 50
Subject From Received Status
Completed Expiration Notice citb_reviewer1 10/18/06 4:49 PM
Completed Expiration Notice citb_reviewer1 10/18/06 4:49 PM
Completed Expiration Notice citb_reviewer1 10/18/06 4:49 PM
Review Content : submit again CIS_DEV 10/5/06 11:17 PM acquired
Review Content : review for testin... CIS_DEV 10/5/06 7:26 PM acquired

There are some important messages which might appear in you Inbox

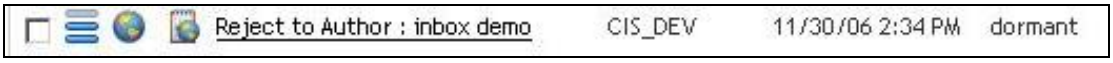
1. Notifications are messages that tell you an event has occurred.
2. Tasks .are electronic assignments that are part of a workflow.

The following shows the message in inbox when workflow is started:

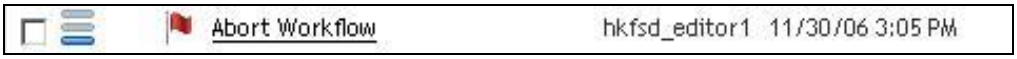
1. When an editor starts an "Approval for <website>" workflow, there is a message in reviewer's inbox asking the reviewer to submit or reject the request.



2. If the reviewer rejects the request, there is a Reject to Author message in editor's inbox



3. If you have stopped a workflow, an Abort Workflow message will be shown in your inbox.



13. Working with version

In WCMS, every document has a version number. When you create a new content, the version number is 1.0. Then if you Edit (with Checkout), Check In and Save then a new version number will be assigned. You can view the old version, delete the version, diff two versions or reinstate an old version.

13.1 View Version

1. Select a file.
2. Click **Version** from the **View** menu.
3. Then a list of version will be shown.

4. You can select each version just like select a file.

13.2 Diff Version

Notes: Diff two versions is processed by external comparison tool.

Diff version means compare two versions.

1. View version of a file then a list of the version will be displayed.
2. Select two versions you want to diff.
3. Then select **Diff versions** from **File → Versions**

13.3 Reinstate a Version

Reinstate a version means make the old version become the current version. By doing this a new version will be created and the file content is same as the old version. And the previous current version will become an old version.

1. View version of a file then a list of the version will be displayed.
2. Select the version you want to reinstate. Reinstate the current version is not allowed.
3. Then select **Reinstate** from menu **File → Versions**

Notes: Only the latest 5 versions of files would be kept online and old versions will be archived to secondary storage on a regular basis.

13.4 Delete Version

Delete a version is similar to delete a document.

1. View version of a file then a list of the version will be displayed.
2. Select the version you want to delete. Each time only one file can be deleted..
3. Then select **Delete Version** from the **File** menu

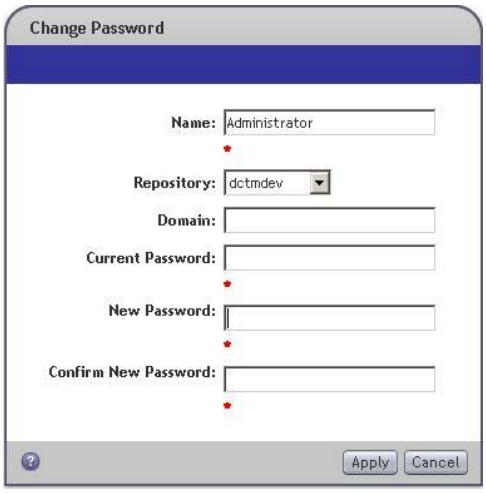
14. Account Management

14.1 Change password

Every user can change his password in the WP login page. It is recommended that users will change their passwords on a regular basis.

1. Click the [+] More Options button

2. Press the Change Password button to enter the change password page



3. Revise the password and click button.

14.2 Change email address

The email address will be required for notification purposes (eg. during a content approval process).

To view and change your email address, you must login to the WP and click the button from the top pull down menu and navigate to the change email page.

Type a new email address in the **E-Mail** field and press the **OK** button at the bottom.